

Chapter II

Interviewing

A successful interview does not result from the chance happening of a good personality mix between an interviewer and an interviewee. Although that helps, a successful interview results mostly from the care and attention given to the process by the interviewer.

Good interviewing practices occur before, during and after the actual interview. Thoughtful preparation, attentive listening, careful questioning and prompt follow-up are all part of a good interview. These skills don't just come naturally; they can be learned and practiced.

Before the Interview

Create a setting that is comfortable and conducive to conversation.

The interviews you conduct with persons interested in public benefits may be in a variety of surroundings. In almost any situation, though, you can have some control of the setting. Before you begin, take stock of the situation and think about what might foster good communication. For example, you can rearrange furniture (even if it is just pulling a chair a little closer) or adjust the lighting (by opening or closing curtains or manipulating a shade) to make the situation more comfortable and conducive to conversation. If you are in the interviewee's home, you should of course be sensitive to the way furniture and lighting are kept, but don't feel overly hesitant to suggest a temporary change that will assist with the interview. For example, you could say, "I don't think I'll be able to hear you well enough with the television at that volume. Could we turn it down a bit while we're talking?"

If you are at a Community or Senior Center, talk with the Center director about creating an appropriate setting for interviews. Think about whether having a desk will help or hinder. Some people think a desk is a barrier between the interviewee and the interviewer; others find it a useful surface to work on and think it creates a comfortable (and professional) distance between people. Make a choice that seems right for you and the people you will interview. If the atmosphere where you must interview is extremely sterile, consider bringing a potted plant or a flower in a vase to make the setting more welcoming.

Be sensitive to the privacy concerns of the person you are interviewing. Close doors where possible, or sit so that your backs are to other persons to avoid being overheard. If you are interviewing several persons in a row, be sure you put away the notes and other information on the previous interviewee before you start on the next. If Mrs. B's papers are out on the desk or in your lap when you are interviewing Mrs. D., Mrs. D. will know that her papers will be revealed to the next person in line. Before you begin interviewing for the day, make sure you have enough folders so each individual's papers can be stored while you talk to the others.

Prepare yourself for the interview.

Make sure you understand as much as you can about what the interviewee's expectations probably are. Find out how the persons to be interviewed came to the interview setting. Did they see a brochure and call ahead for an appointment? Have they waited weeks for this opportunity, or was it a spur of the moment occurrence because they happened to be at the counseling location and saw a sign? If there are brochures or signs advertising the interview opportunity, read them so you know what information the people have about the process. All of this will help you when the interview starts to understand and respond to the expectations of the interviewee.

If you will be providing information during the interview, make sure you are very knowledgeable about the information or have all the reference materials you will need to assure that the information you provide is accurate. If you are using forms, make sure you have enough. Your credibility as an interviewer goes down in the eyes of the interviewee if you do not seem organized and prepared.

Decide ahead of time how much time that you can commit to the interview. You will have to pace yourself accordingly. Have a clear sense of what information you must either give or get during the interview. Think through how you will start the questioning and how you will give and get the necessary information if time runs short.

During the Interview

Begin the interview on an empathetic note.

Naturally, you will begin the interview with the common courtesies, but try to make them more than "common." From the instant you meet the person to be interviewed, he or she should know that you respect and care about him or her as a person. Try to notice something about the person or his or her environment that will enable you to make a personal remark or ask a personal question (not personal in the sense of private, but personal in the sense of relating to that individual person).

"Is that your daughter with you? How many other children do you have?" or "I saw that you came on the bus. Do we have to be finished at a particular time so that you can catch the bus home?" You don't have to stop with just one pleasantry. Try to engage the person in some friendly conversation that goes beyond the very surface. This will let the interviewee know that you see her not as just another in a line of persons, but as an individual with a particular set of circumstances.

Make eye contact "early and often." Immediate direct eye contact cannot be underestimated as a tool to establish a relationship between two people. Not only does this make the interviewee feel that you are attentive to what she has to say, it allows you to pick up on her nonverbal cues. Is the person nervous, confused, distracted or tense? Your ability to read the interviewee will allow you to adjust your communication to respond to her feelings.

Be attentive to your nonverbal cues as well. Smile when you greet the client. When you sit, lean forward a little toward the interviewee, making sure you don't invade her "space." Keep your body in an open position, rather than a closed posture with arms

crossed. Let the interviewee see that you are watching to make sure that she is getting comfortable before the more substantive conversation begins.

Don't forget to tell the interviewee your name and explain your association. "I'm Jane Doe. I'm a volunteer with the Benefits Navigator Program. I'm one of a group of volunteers who has been trained to talk to people about programs that might be available to help them with food, medical care and income. Is that what you're here to talk about?" That kind of introduction establishes your expectations about the interview and solicits a response that allows the interviewee to tell you what her expectations are. It is critical for a good interview that the participants have the same expectations for the session, or at least understand what each other's expectations are.

Try to get a sense of how the interviewee feels about the session. Is the person embarrassed about asking for this kind of assistance? Is she uncomfortable with the idea of sharing private information about her income and resources? Do you sense a lack of trust or a sense of insecurity? When you pick up on any of these or other feelings, you need to do what you can to lessen the discomfort. "I know it's hard to reveal all this information, but it's just between us." Or, "I wish I didn't have to ask you these questions, but I can't give you good advice if I don't. I won't be sharing the information with anyone." Or, "I know it's hard to be talking about getting help from the government. But I'm sure you've contributed your share over the years. It's time you get something when you need it."

Focus the interview.

Before too much time passes, you will have to focus the interview. You have to move from the introductory conversation into the substance of the interview. While it is your job to guide the interview, you want to make sure that the interviewee gets to say what she or he came to say. One common way to begin is with an open-ended question. "What kind of problem do you have?" or "What can I do for you?" or "What do you want to talk about?" Open-ended follow up questions are helpful, too. "Can you tell me more about that?" When you feel you have a good sense of the issue the person wants to talk about, you can narrow the questions to get the more specific information you need.

If you find the interviewee spending too much time talking about things that are not relevant to the pertinent issues, you have a few options. First, be patient and try to think about what the interviewee is trying to communicate. Perhaps she is leading up to an important piece of information and can't mentally separate it from the irrelevant details. Perhaps there is something being said implicitly but not explicitly. You might restate, with many fewer words, what you think the person is trying to say. Begin with, "So you are saying...."

Second, respond only to the relevant information and not to the irrelevant information. Try using both verbal and nonverbal responses to what is relevant, such as saying "OK" or "I understand" or "I see," and by establishing direct eye contact and taking notes. Make no response at all to the irrelevant information. This is an indirect way to keep the interviewee focused on the relevant information, since she will probably respond to your responses.

Third, if you have to, be direct. Tactfully interrupt, but don't neglect to acknowledge the client's feelings. "I can see that you've had a tough time. I could probably be of more assistance to you, however, if we could talk more about...." You might try, "That's interesting, but I didn't get the details I needed about.... Can we go back and talk about...?"

Reflect and clarify the interviewee's thoughts and feelings.

Throughout the interview, you need to make sure you understand the interviewee correctly. You also need to continue your connection with the interviewee. You can do this by reflecting what the interviewee has said. "Let me see if I got this straight." Then summarize the previous statements of the interviewee. This reassures the interviewee that she has been heard and assists you in establishing that you have, in fact, understood correctly.

You may also wish to reflect on the interviewee's feelings. Recognizing that you can only guess as to what the person is feeling, you can express the reflection tentatively. "I imagine that made you angry," or "It appears to me that you are very troubled by this problem." You can also ask a question about the person's feelings: "Are you frustrated by having to provide this information?" or "Did that confuse you?" This kind of questioning and reflection can increase the interviewee's feeling that you care about her and view her as an individual. It also helps you get a better sense of who the person is and how you can respond to her in the most effective manner. Remember to be sensitive to racial, cultural and gender differences. You don't want the interviewee thinking, "Lady, you can't know anything about the way I feel."

Get it all and get it down.

Always keep written notes about the interview. Do not rely on your memory for anything that might be important. A form is usually an effective tool to make sure you remember to ask all the important questions. If you are using a form, be sure it is filled in fully before you end the fact-gathering process. Take a minute to review, and say: "To make sure I got everything, let me review this for a moment." Don't worry about the silence. Be deliberate in making sure that you have what you need. A few extra minutes in the interview can save lots of phone calls and letters later.

When you feel you have obtained the necessary facts about the client, be sure to conclude with a final catch-all question, like, "Is there anything else you think I should know?" Then, clarify what the interviewee expects you to do. "What would be most helpful to you at this point?"

Provide clear and simple information.

After you have gathered information from the interviewee, it is your turn to provide information to her. The nature of the information you provide will depend on the purpose of the interview and the expectations of the participants. If you have interviewed a person to try to determine if she might be eligible for a particular government benefit program, give her your opinion if you feel comfortable doing so. Explain the application process in detail. Go through the eligibility requirements and show her where you think she meets or fails to meet the guidelines. Point out problem areas. Remember, however, that you are not the final arbiter of eligibility. The purpose of your assessment is to determine if it is

likely or not likely that the interviewee will get assistance. While you can and should express your opinion, make sure she understands that only the agency that administers the program can determine eligibility.

If you have interviewed a person who has been denied a benefit, decide what you will do after the interview and what the interviewee needs to do. Will one of you call the agency to ask questions? Will one of you gather additional information?

Will you have a follow-up interview? Will one of you ask for an appeal? You, as the interviewer, are the one in control of this process. You can, and should, ask the interviewee to take certain steps to resolve the problem. Just be sure you are clear about who will do what. It is a good idea to write down anything that the interviewee needs to do and give the paper to the interviewee. You should also make a note of what you have agreed to do and what you have asked the interviewee to do. Both persons must have a clear understanding of what will happen next.

After the Interview

Complete your written documentation.

Even though you may have tried to take good notes as you interviewed an individual, you may have omitted certain items. Use the few minutes right after the interviewee leaves to complete your notes. Write down any comments you have about the person that will help you remember her, especially if you have agreed to do some follow-up. Be sure you write down what it is you have agreed to do and what it is the interviewee agreed to do. *Don't* wait until after you have interviewed five additional people to go back and try to finish your notes on each one. There is too big a risk that you will forget something or get one person's details confused with another's. When you have completed your documentation, be sure that it is kept in a place where it can be easily found by those who may need to refer to it, but in a place where its contents will be kept confidential.

Follow up as agreed.

Few things will hurt your credibility more than not following through on what you said you would do. If you have agreed to find out additional information for someone, do it as soon as possible (within the next few days usually) and get the information to the interviewee. It is usually best to give the person the needed information both on the phone and in writing if that is possible. If you have agreed to talk to someone in an agency on behalf of the interviewee, do that and let the interviewee know the results of your conversation. Again, a follow-up phone conversation and letter is usually best.

**INTERVIEW FORM
CLIENT DATA SHEET**

Interviewer: _____

Date: _____

Name: _____

Address: _____

Phone: _____ Alternate: _____

County of Residence: _____

Age: _____ Social Security No.: _____

U.S. Citizen: ☐ Yes ☐ No If no, residency status: _____

Marital Status:

- ☐ Married, living with spouse
- ☐ Married, separated from spouse
- ☐ Divorced
- ☐ Widowed
- ☐ Single

If married, spouse's name: _____

Other persons living in the household and relationship:

Current recipient of:

- ☐ Social Security retirement benefits
- ☐ Social Security disability benefits
- ☐ SSI (Supplemental Security Income)
- ☐ Medicare
 - ☐ Part A
 - ☐ Part B
- ☐ Medicaid
 - ☐ As an SSI Recipient
 - ☐ As an elderly, blind or disabled person
 - ☐ As an Medicare beneficiary (MQB)
- ☐ Food Stamps
- ☐ Low Income Energy Assistance

Household Income and Resources:

Client's monthly income: \$ _____ Source: _____
 \$ _____ Source: _____
 \$ _____ Source: _____
Spouse's monthly income: \$ _____ Source: _____
 \$ _____ Source: _____
 \$ _____ Source: _____
Total monthly income: \$ _____

Resources (owned by client or spouse, approximate values):

Checking account: _____ Savings account: _____
Cars/trucks, etc. _____ Investments (stocks, bonds) _____
Real estate (excluding home) _____
Life insurance (face value and cash value, if known) _____
Other items of value _____
Total resources: \$ _____

INTERVIEW NOTES

Reason for client interview:

Facts of client's situation:

Client goals:

What will be done next:

By client:

By interviewer:

Advice given to client:
